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ABSTRACT

The Orientation and Training Task Force of the Temple University Library was charged by the Director of the Central Library System (CLS) in October 1987 to develop plans for a three-level program, including an orientation component for all CLS staff, a second component for staff who regularly work at any public service point, and a third component of in-depth training for those who staff full-service reference desks. In response, the Task Force proposed a five-point program for new and experienced staff, consisting of a guided tour of library environs for new staff, development of a "Central Library System Services Manual," a set of exercises to accompany the manual and to introduce the library's online catalog, development of a library skills workbook, and a schedule of orientation and staff development sessions. This report describes program progress from fall 1988 through spring 1989, noting the goals met and the goals yet to be accomplished. Recommendations are made concerning the organizational structure and tasks of the standing committee responsible for the orientation and training program; the future administration of the program, including guidelines for maintaining the manual, exercises, and other materials, for conducting staff sessions, and for involving all members of the library's staff; and for the orientation and training timetable for 1989-1990. (GL)

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REPORT ON THE PROGRESS OF THE CLS STAFF ORIENTATION AND TRAINING PROGRAM AND RECOMMENDATIONS FOR THE FUTURE

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HISTORY AND GOALS OF THE TASK FORCE

The Orientation and Training Task Force was charged by the Director of the Central Library System in October 1987 to develop plans for "a three-level program--an orientation component for all CLS staff, a second component for staff who regularly work at any public service point, and a third component of in-depth training for those who staff full-service reference desks" (page 1 of proposal, March 1988). Based on this initial directive the Orientation and Training Task Force (then known as the Library-wide Staff Orientation and Public Services Training Task Force) set as the goals of its proposed program:

(1) To introduce staff to the Library's organization, mission, departments, and policies

(2) To orient staff to the Library's physical environment, collections, and facilities

(3) To familiarize staff with the Library's varied collections and resources such as the card catalog, the online catalog, and TULSH, which are needed to access them

(4) To provide a source by which current information regarding CLS could be made accessible to all staff to keep them abreast of the changes in the system

(5) To provide additional staff development opportunities in the form of sessions covering a variety of topics of particular relevance to those in public service, including new system-wide developments such as the online catalog, more in-depth examinations of CLS's resources and collections, and communications skills

(6) To propose a model for a library-wide standing committee which will provide long-term maintenance, coordination and planning for the orientation and training program.

To these ends the Task Force proposed in March 1988 a five-point program for new and experienced staff, consisting of

(1) a guided tour of library environs for new staff

(2) a Central Library System Services Manual, containing information regarding staff, departments, collections, policies, and facilities about the campus and the libraries

(3) a set of three exercises, two to accompany the CLS Services Manual and one to introduce the online catalog

(4) completion of the Library Skills Workbook by public service staff

(5) a schedule of orientation and staff development sessions, some for all staff, others primarily for public service staff

The program itself was accepted in May 1988 by the CLS Administrative Council, although final acceptance of the proposed standing committee was postponed. The Task Force introduced the exercises, manual, and other written components of the program to a pilot group of staff during the summer of 1988 and made some revisions in response to suggestions from its members before distributing materials (including manuals, workbooks, guided tours, exercises and answer sheets) to department heads in October.

O & T Program Progress, Fall 1988 through Spring 1989

During Fall semester 1988 both experienced and new full-time staff worked on their exercises and workbooks. Information collected from department heads recently revealed that approximately 75% of full-time staff have completed their assigned orientation and training materials. Completion dates for the remaining staff have been negotiated with their department heads.

Additionally, three staff sessions were conducted by the O & T Task Force during Fall 1988. Virtually all staff attended the September 4 session on the Central Library System's administration, goals and mission led by the Director and Associate Directors and the October 9 session on library departments in which department heads (or in some cases their representatives) detailed the responsibilities of their areas. With few exceptions all public service staff, including branch library staff, attended one of the three sessions on A+ Service for the CLS conducted by Karen Cherwony, head of university Human Resources Development, during the month of December.

Goals Met and to be Met

The first three goals listed on page 1 of this report have already been met via Fall 1988 staff development sessions and exercises. The CLS Services Manual meets the fourth goal, that is, "to provide a source by which current information regarding CLS could be made accessible to all staff." The program's fifth goal has been met for this year via orientation and training sessions already held in Fall 1988. Further orientation to CLS resources such as the online catalog and TULSH will be conducted via additional staff sessions planned for later during Spring 1989. Moreover, we have recommended in this report how these program goals should continue to be met, including suggesting that basic orientation and training sessions on library administration, departments and public service continue to be held at least once a semester (and preferably even more frequently via utilization of videotaped sessions) to acquaint new staff with the CLS and that additional sessions, perhaps one a semester, provide further training opportunities on a continuous basis for staff.

The major goal that needs to be met is the appointment of a group to evaluate the 1988-89 program, revise and continue it. The following recommendations cover this concern and others pertaining to the evolution and evalution of the library-wide staff orientation and training program implemented by this task force.

RECOMMENDATIONS REGARDING STANDING COMMITTEE STRUCTURE

We propose that responsibility for maintenance and planning of the orientation and training program be taken up by a standing committee consisting of members selected by Administrative Council and reporting to one of the Associate Directors. We recommend the committee be composed of the following:

(A) one chair and four permanent members; of these five members, at least one will be from each of the following departments: RIS, Access Services, either Tyler or Ambler Libraries, and either Bibliographic Services or Acquisitions and Materials Processing. We recommend that the Chair be a department head appointed by Administrative Council according to the CLS model for standing committees.

(B) at least one member, serving a one-year term, selected from any department.

The permanent membership will give the committee continuity, while the temporary member(s) will bring new perspectives and energy and allow a variety of staff to be involved in the program. We recommend that all levels of staff (administrative, supervisory, professional, paraprofessional, and clerical) be considered for membership on this committee, either as permanent or temporary members. Training and/or supervisory experience are reasonable criteria for the permanent members.

We suggest that the Administrative Council select at least two appointees from the present Task Force to serve on the standing committee either as permanent or term members to assure a smooth transition from one group to another.

In its first report to Administrative Council (March 9, 1988), the Task Force recommended that the standing committee be appointed by May 1989. We now recommend that the standing committee be appointed no later than April 1, 1989 so that it will have time to meet in the spring to prepare for the fall program. Once it is appointed, the standing committee will assume responsibility for the maintenance and planning of the program, including:

(A) soliciting material from liaisons and others to update the tours, exercises, etc.; providing committee-revised materials at least twice a year; and issuing interim notices as often as necessary to committee liaisons so that they can update and correct their materials

(B) planning and conducting other staff development sessions on an on-going basis

(C) planning and conducting continuing needs assessment on which to base new plans for the program

(D) planning for future developments to extend the scope of the program, keeping in mind the additional recommendations of the OMS Public Services Self-Study (April 1984) and the findings of (c) above. Future plans could include the development and incorporation of a second level of training for staff whose positions are not primarily devoted to direct public services, the possibility of which was suggested by Administrative Council in Mr. Myers' letter (dated May 1988) to Gwen Arthur, Task Force Chair.

(E) planning and conducting an evaluation of the Orientation and Training Task Force's 1988-89 program.

We suggest that the standing committee meet at least once a month to plan and coordinate programs, review items for updating, and otherwise carry on the mission of staff orientation and training.

FUTURE PROGRAM ADMINISTRATION

Manual, Exercises, and Other Materials

All materials will need to be updated at least two times a year, but sometimes more often, as needed. Therefore, the committee needs to determine the best process for maintaining the manuals, exercises, and other materials. Two options which the committee could consider are:

(A) Centralized system: Memos concerning changes would be sent to the committee. A designated member of the committee would make the changes on a master diskette. A copy of the changed diskette would then be routed to the departments with information about which pages would need to be reprinted. Each department would make a new copy of the diskette and reprint the changed pages.

The system could be further centralized by having the committee copy changes onto diskettes sent to the committee by the departments.

(B) Decentralized system: The committee would send a memo indicating required changes to each department. Each department would make the changes on their diskette and reprint the changed pages.

The advantages of centralization are:

(1) Uniform changes
(2) Less work for departments
(3) Greater use of automation

The advantages of decentralization are:

(1) Possibility of customizing by departments
(2) Less work for committee
(3) Increased staff/liaison awareness of changes

In addition to updating the materials, the committee needs to make sure that new employees complete the exercises in an optimum time. The Task Force recommends that the exercises should be completed within 6 weeks after hiring.

Staff Sessions

The Task Force recommends videotaping the sessions involving the administration and the department heads next semester. The videotape can then be used as needed for new staff as they arrive throughout the year. However, once a year some provision should be made to enable new staff to meet and talk with the administrators in person. We also recommend investigating the possibility of making a more professional videotape of these programs.

The Task Force recommends that at least one new session to be attended by both new and existing staff be planned and presented each semester. Planning for these sessions should be coordinated with the Continuing Education Committee of the Academic Assembly of Librarians to eliminate duplication of effort. The following definitions are offered to distinguish between the two kinds of sessions:

> Training sessions -- programs designed to teach staff skills needed to adapt to changes in the library or to increase ability to provide service to the public. Examples: introduction to changes in the online catalog; workshop on service to international students.
>
> Continuing education programs -- programs designed to apprise staff of new developments in the library world or in the Temple University Libraries which may not necessarily impact directly on job performance, but which nevertheless are of interest to employees in the library. Examples: preservation of library materials; Center for Public History.

In addition to continuing the staff program implemented this year, the standing committee might also be an appropriate body to assume a larger role in the coordination of staff development in the CLS. Such coordination could possibly include providing resources and expertise to library administrators initiating departmental development programs, acting as liaisons between library and non-library staff in the implementation of development programs, as needed, and keeping apprised of the variety of development efforts in the CLS in order to reduce duplication of effort and increase effectiveness of individual initiative in the Library's staff development programs.

Staff Participation

New staff should participate in the program according to the chart (see page 7). Existing staff should participate in any additional sessions, as described above under Staff Sessions, depending on the relevance of the session to their department.

Although students did not participate in the program in its first year, the Task Force recommends that participation in the program should be required of all students at public service desks: Circulation, Reserve, Reference, Current Periodicals, and Micromaterials. Again, the chart on the following page indicates which parts of the programs students should be involved in.

The Task Force recommends that student workers in branch and departmental libraries should complete the same program except that the branch library students should do the Paley Library exercise solely in conjunction with the CLS Services Manual rather than as a self-guided tour. The students who work in the departmental science libraries should come to Paley to complete the exercises.

The Task Force recommends investigating the possibility of expanding the involvement of non public service students.

New Staff Participation, 1989-1990

SERVICES		PROGRAMS			
		Tour	Exercises	Workbook	Sessions*
	Reference				
	Full- and part-time staff	●	●	●	All
	Students	●	●	●	III
	Circulation/Reserve/ Other Public Services				
	Full- and part-time staff	●	●	●	I-V
	Students		●	●	III
	Other Services				
	Full- and part-time staff	●	●		I, II (others optional)

* Orientation and Training Sessions

I. Library Administration: Goals, Missions
II. Department Heads
III. Public Service Training
IV. Catalogs -- Online and Card
V. Indexes and TULSH

RECOMMENDATIONS FOR STANDING COMMITTEE TIMETABLE FOR 1989-90

Administrative Council appoints standing committee or some other group to continue O & T Task Force	As soon as possible, preferably by 04/01
CLS Service manuals and exercises updated	Fall 1989
First three orientation sessions (library administration, department heads, and customer service) held for new staff and videotaped for future use	Fall 1989
Expansion of program to include student workers from public service desks	Fall 1989
One staff training session for new and experienced staff to cover some public service concern not previously covered (for example, working with disabled patrons)	Fall/Winter 1989
Updating of CLS Service manuals and orientation exercises	Winter/Spring 1990
Remaining orientation and training sessions (online catalog, card catalog, and TULSH) held for new staff	Winter/Spring 1990
Another staff training session for new and experienced staff	Winter/Spring 1990
Appointment by Administrative Council of new temporary member (is such exists) of committee	Spring 1990
Evaluation of Orientation and Training Program	Spring/Summer 1990